

## EDITOR'S NOTE

BY JOHN SULLIVAN



**Anytime,  
anywhere,  
on any piece  
of glass.**

## Your Silver Bullet

**THE WIREHOUSE EXODUS**, baby boomer retirement, a uniform standard of care, Godot—things we're waiting for that never arrive.

At a gathering of the Young Turks of technology at the FPA's national conference in September, the excitement over integration (yes, integration) was palpable, because it's finally arrived.

"That 'killer app' that everyone wanted and talked about 10 years ago is here," said Redtail CEO Brian McLaughlin. "And it's driven by integration."

Chris Valleley, a senior product manager with TD Ameritrade Institutional, chimed in that advisors are more tech savvy, have higher expectations and are looking for simplification of process (thanks, Apple).

"They want a one-stop-shop for everything," added Eric Clarke, president of Orion Advisor Services. "And they can now have it. The client won't know what's happening behind the scenes, because it will all be private-labeled to the advisor. One change at the client interface level will result in the change being made across all the disparate systems that are talking to one another."

It's no longer about the business conforming to technology; quite the opposite. Clarke noted he and the other roundtable participants are members of Your Silver Bullet, a collection of technology companies committed to talking, working and interfacing with one another for the advisor's and client's benefit (think ISO).

As its website states ([www.yoursilverbullet.com](http://www.yoursilverbullet.com)), it is not a platform, product, pre-packaged suite of applications or consulting organization, but a "committed community."

"Portable, secure data aggregation that can be viewed and rebalanced in real time over mobile devices is here now," McLaughlin said.

How true that is, and Trust Company of America is on the leading edge. This month's cover subject has a big announcement in the field of mobile, and specifically tablet, technology, that will forever change the way advisors do business, according to *Investment Advisor* columnist Bob Clark—and that's not hyperbole.

CEO Frank Maiorano and his team have a platform that's so easy to use, it's completely intuitive, with no user manual and minimal training required. It's perfect for advisors and, more importantly, their clients, who might have just predated the computer revolution, but nonetheless possess a majority of assets.

"Anytime, anywhere, on any piece of glass," said Trust Chief Information Officer Dennis Noto.

For advisors still hosting their own client information and data (and those still on the dreaded Excel spreadsheet, for God's sake), it's time to get real. Little things like cost reduction, automatic rebalancing, real-time updates, reduction of overhead and administration, straight-through processing, client communication, marketing, security and compliance await: all at the touch of a button from wherever you and your client happen to be.

I now see why they were all so excited.

*John P. Sullivan*

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